



The Family Office Formula

FamilyOffices.com

AGENDA

November 6th, 2025
New York, NY

TIME	TOPIC
10:00 a.m. - 10:05 a.m.	Welcome Address from Polsinelli Law Firm
10:05 a.m. - 10:25 a.m.	Family Office Formula: Overview, What Disrupts the Formula, What Not to Do
10:25 a.m. - 10:40 a.m.	Seven Valuable Lessons I Learned For Effective Private Placement Investing Marc Halpern - Due Diligence Investor Club
10:40 a.m. - 11:05 a.m.	Family Office Formula Fundamentals: What are the 7 building blocks at the core of wealth creation?
11:05 a.m. - 11:20 a.m.	You're a Wealth Creator? Guess What! You're Also a Target: 5 Things You Can Do About It Mitzi Perdue - Founder of CERES Farms
11:20 a.m. - 11:50 a.m.	Breakout Session + Worksheet Completion + Networking
11:50 a.m. - 12:05 p.m.	Top 5 Strategies to Scale, Structure, Negotiate and Manage Time John Lettera - Fairbridge Asset Management & Richard C. Wilson - Family Office Club
12:05 p.m. - 12:20 p.m.	Build a Business That Your Family Can Own for the Next Century Pierre duPont - Certy Partners
12:20 p.m. - 1:05 p.m.	Lunch Networking Session
1:05 p.m. - 2:15 p.m.	Family Office Formula Checklist: The 30 Mental Models + Actions Most Common Among Ultra-Wealthy Business Builders
2:15 p.m. - 2:30 p.m.	Centimillionaire Strategies: 3 Strategies on Growing a Business, 3 Insights from our Exit, and 3 Mental Models only the Top .1% in Business Have Yahya Mahmoud - BNQ Group
2:30 p.m. - 3:00 p.m.	Family Office Formula Cohesion + Adoption: Fundamentals Combined + Worksheet Session + Breakout Groups + Networking
3:00 p.m. - 3:30 p.m.	Open Discussion + Q&A + Top Insights From the Day + 1 Pager Completed to Summarize Your Formula
3:30 p.m. - 4:00 p.m.	Peer-to-Peer Founder & Investor Networking